

(12) INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

(19) World Intellectual Property  
Organization  
International Bureau



(43) International Publication Date  
1 April 2004 (01.04.2004)

PCT

(10) International Publication Number  
**WO 2004/026500 A3**

(51) International Patent Classification<sup>7</sup>: **E21B 23/00**,  
43/10

[US/US]: 19115 Prospect Ridge Lane, Houston, TX 77094  
(US). **RING, Lev** [US/US]: 14126 Heatherhill Place,  
Houston, TX 77077 (US).

(21) International Application Number:  
PCT/US2003/025675

(74) Agent: **MATTINGLY, Todd**; Haynes and Boone, LLP,  
Suite 3100, 901 Main Street, Dallas, TX 75202 (US).

(22) International Filing Date: 18 August 2003 (18.08.2003)

(25) Filing Language: English

(26) Publication Language: English

(30) Priority Data:  
60/412,544 20 September 2002 (20.09.2002) US

(81) Designated States (*national*): AE, AG, AL, AM, AT, AU,  
AZ, BA, BB, BG, BR, BY, BZ, CA, CH, CN, CO, CR, CU,  
CZ, DE, DK, DM, DZ, EC, EE, ES, FI, GB, GD, GE, GH,  
GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KP, KR, KZ, LC,  
LK, LR, LS, LT, LU, LV, MA, MD, MG, MK, MN, MW,  
MX, MZ, NO, NZ, OM, PH, PL, PT, RO, RU, SC, SD, SE,  
SG, SK, SL, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ,  
VC, VN, YU, ZA, ZM, ZW.

(71) Applicant (*for all designated States except US*): **ENVEN-  
TURE GLOBAL TECHNOLOGY [US/US]**; 16200 A.  
Park Row, Houston, TX 77084 (US).

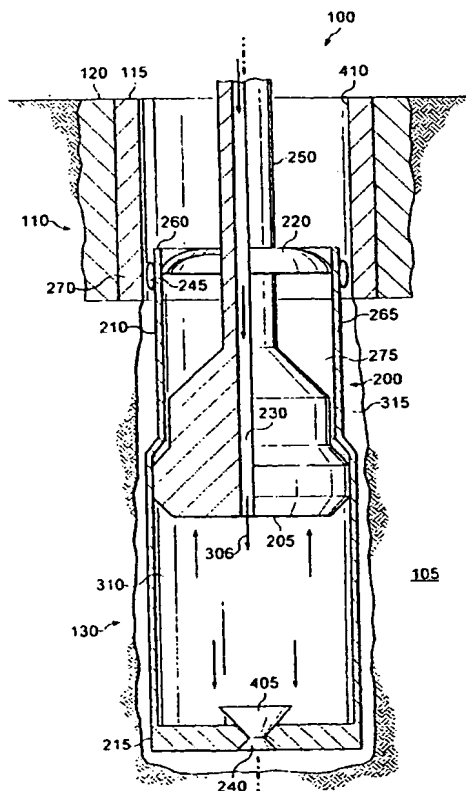
(84) Designated States (*regional*): ARIPO patent (GH, GM,  
KE, LS, MW, MZ, SD, SL, SZ, TZ, UG, ZM, ZW),  
Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM),  
European patent (AT, BE, BG, CH, CY, CZ, DE, DK, EE,  
ES, FI, FR, GB, GR, HU, IE, IT, LU, MC, NL, PT, RO,

(72) Inventors; and  
(75) Inventors/Applicants (*for US only*): **SHUSTER, Mark**

[Continued on next page]

(54) Title: SELF-LUBRICATING EXPANSION MANDREL FOR EXPANDABLE TUBULAR

(57) Abstract: A self-lubricating expansion mandrel (205) includes a system for lubricating the interface between the self-lubricating expansion mandrel (205) and a tubular member (210) during the radial expansion of the tubular member (210).



WO 2004/026500 A3



SE, SI, SK, TR), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, GQ, GW, ML, MR, NE, SN, TD, TG).

(88) Date of publication of the international search report:  
13 January 2005

**Declaration under Rule 4.17:**

— of inventorship (Rule 4.17(iv)) for US only

**(15) Information about Correction:**

**Previous Correction:**

see PCT Gazette No. 43/2004 of 21 October 2004, Section II

**Published:**

— with international search report

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

## INTERNATIONAL SEARCH REPORT

International application No.

PCT/US03/25675

**A. CLASSIFICATION OF SUBJECT MATTER**

IPC(7) : E21B 23/00, 43/10

US CL : 166/207, 55.7

According to International Patent Classification (IPC) or to both national classification and IPC

**B. FIELDS SEARCHED**

Minimum documentation searched (classification system followed by classification symbols)

U.S. : 166/207, 55.7, 50, 55, 55.1, 205, 209, 216, 242.1, 297, 380, 384

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)  
Please See Continuation Sheet**C. DOCUMENTS CONSIDERED TO BE RELEVANT**

Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	US 2002/0062956 A1 (MURRAY et al.) 30 May 2002 (30.5.2002), whole document	1-9
---		-----
Y		10-23
Y	US 5,014,779 A (MELING et al) 14 May 1991 (14.05.1991), column 3, lines 31-36	19-23
Y	US 4,526,839 A (HERMAN et al) 2 July 1985 (02.07.1985), column 5, line 60- column 6, line 16.	10-18, 23
A	US 6,325,148 B1 (TRAHAN et al) 4 December 2001, (04.12.2001), whole document	1-23
A	US 3,203,451 A (VINCENT) 31 August 1965 (31.08.1965), whole document.	1-23
A	US 6,158,963 A (HOLLIS et al) 12 December 2000 (12.12.2000), whole document.	1-23
A	US 4,505,987 A (YAMADA et al.) 19 March 1985 (19.03.1985), whole document.	1-23

☐ Further documents are listed in the continuation of Box C.☐ See patent family annex.

## \* Special categories of cited documents:

"A" document defining the general state of the art which is not considered to be of particular relevance

"E" earlier application or patent published on or after the international filing date

"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)

"O" document referring to an oral disclosure, use, exhibition or other means

"P" document published prior to the international filing date but later than the priority date claimed

"T"

later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention

"X"

document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone

"Y"

document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art

"&amp;"

document member of the same patent family

Date of the actual completion of the international search

11 December 2003 (11.12.2003)

Date of mailing of the international search report

25 MAY 2004

Name and mailing address of the ISA/US

Mail Stop PCT, Attn: ISA/US

Commissioner for Patents

P.O. Box 1450

Alexandria, Virginia 22313-1450

Facsimile No. (703) 305-3230

Authorized officer

David J. Bagnell

Telephone No. (703) 308-1113

**INTERNATIONAL SEARCH REPORT**

PCT/US03/25675

**Continuation of B. FIELDS SEARCHED Item 3:**  
JPO, EPO, Derwent

Terms: swedge/swage, lubricate/lubricant, teflon, friction, coating,

(12) INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

(19) World Intellectual Property  
Organization  
International Bureau



(43) International Publication Date  
1 April 2004 (01.04.2004)

PCT

(10) International Publication Number  
WO 2004/026500 A3

(51) International Patent Classification<sup>7</sup>: E21B 23/00,  
43/10

[US/US]: 19115 Prospect Ridge Lane, Houston, TX 77094  
(US). RING, Lev [US/US]: 14126 Heatherhill Place,  
Houston, TX 77077 (US).

(21) International Application Number:  
PCT/US2003/025675

(74) Agent: MATTINGLY, Todd; Haynes and Boone, LLP,  
Suite 3100, 901 Main Street, Dallas, TX 75202 (US).

(22) International Filing Date: 18 August 2003 (18.08.2003)

(25) Filing Language: English

(26) Publication Language: English

(30) Priority Data:  
60/412,544 20 September 2002 (20.09.2002) US

(81) Designated States (*national*): AE, AG, AL, AM, AT, AU,  
AZ, BA, BB, BG, BR, BY, BZ, CA, CH, CN, CO, CR, CU,  
CZ, DE, DK, DM, DZ, EC, EE, ES, FI, GB, GD, GE, GH,  
GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KP, KR, KZ, LC,  
LK, LR, LS, LT, LU, LV, MA, MD, MG, MK, MN, MW,  
MX, MZ, NO, NZ, OM, PH, PL, PT, RO, RU, SC, SD, SE,  
SG, SK, SL, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ,  
VC, VN, YU, ZA, ZM, ZW.

(71) Applicant (*for all designated States except US*): ENVEN-  
TURE GLOBAL TECHNOLOGY [US/US]: 16200 A.  
Park Row, Houston, TX 77084 (US).

(84) Designated States (*regional*): ARIPO patent (GH, GM,  
KE, LS, MW, MZ, SD, SL, SZ, TZ, UG, ZM, ZW),  
Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM),  
European patent (AT, BE, BG, CH, CY, CZ, DE, DK, EE,  
ES, FI, FR, GB, GR, HU, IL, IT, LU, MC, NL, PT, RO,

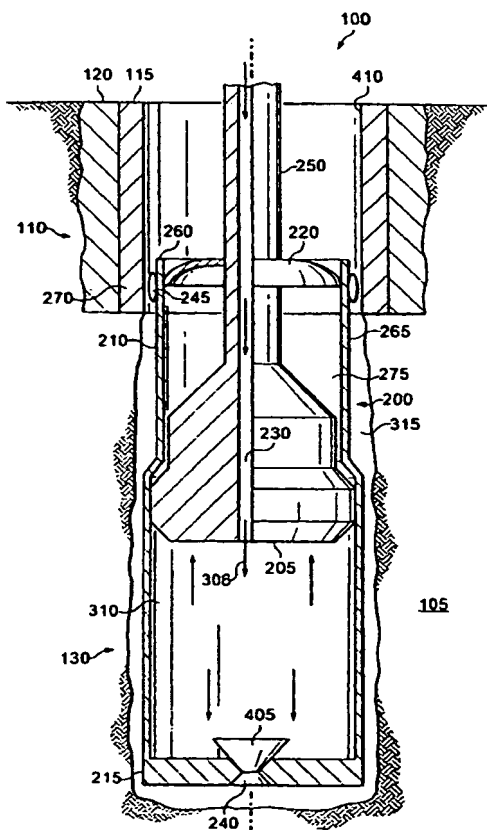
(72) Inventors; and

(75) Inventors/Applicants (*for US only*): SHUSTER, Mark

[Continued on next page]

(54) Title: SELF-LUBRICATING EXPANSION MANDREL FOR EXPANDABLE TUBULAR

(57) Abstract: A self-lubricating expansion mandrel (205) includes a  
system for lubricating the interface between the self-lubricating expan-  
sion mandrel (205) and a tubular member (210) during the radial ex-  
pansion of the tubular member (210).



WO 2004/026500 A3



SE, SI, SK, TR), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, GQ, GW, ML, MR, NE, SN, TD, TG).

Date of publ. of the amended claims: 24 February 2005

**Declaration under Rule 4.17:**

— of inventorship (Rule 4.17(iv)) for US only

**Published:**

— with international search report

— with amended claims

**(15) Informat. about Correction:**

**Previous Correction:**

see PCT Gazette No. 43/2004 of 21 October 2004, Section II

**(88) Date of publication of the international search report:**

13 January 2005

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

## AMENDED CLAIMS

[received by the International Bureau on 23 July 2004 (23.07.2004);  
claims 24-47 added]

17. The self-lubricating expansion mandrel of claim 12, wherein the solid lubricant retained in the plurality of troughs formed in a textured pattern comprises a thermo-sprayed coating.
18. The self-lubricating expansion mandrel of claim 12, wherein the depth of the plurality of troughs formed in a textured pattern is in a range of between about 50 and 150 microns.
19. A self-lubricating expansion mandrel for expanding a tubular member, comprising:
  - a housing including a tapered outer surface;
  - one or more grooves formed in the tapered outer surface; and
  - a grease supply chamber in the housing;
  - a conduit from the grease supply chamber to one or more of the grooves; and
  - means for forcing grease from the grease supply chamber through the conduit to one or more of the grooves.
20. The self-lubricating expansion mandrel of claim 19, wherein the one or more grooves comprise circumferential grooves.
21. The self-lubricating expansion mandrel of claim 19, wherein the grooves comprise axial grooves.
22. The self-lubricating expansion mandrel of claim 19, wherein the grooves comprise a pattern of grooves with both an axial and a circumferential component.
23. The self-lubricating expansion mandrel of claim 22, wherein the pattern of grooves comprises a textured surface.
24. A self-lubricating expansion mandrel for expanding a tubular member, comprising:
  - a housing including a tapered outer surface;
  - one or more grooves formed in the tapered outer surface; and
  - solid lubricant retained in one or more of the grooves;
  - wherein the grooves comprise circumferential grooves.
25. A self-lubricating expansion mandrel for expanding a tubular member, comprising:
  - a housing including a tapered outer surface;
  - one or more grooves formed in the tapered outer surface; and
  - solid lubricant retained in one or more of the grooves;
  - wherein the grooves comprise axial grooves.
26. A self-lubricating expansion mandrel for expanding a tubular member, comprising:
  - a housing including a tapered outer surface;
  - one or more grooves formed in the tapered outer surface; and
  - solid lubricant retained in one or more of the grooves;
  - wherein the grooves comprise a pattern of grooves with both an axial and a circumferential component.
27. A self-lubricating expansion mandrel for expanding a tubular member, comprising:
  - a housing including a tapered outer surface;
  - one or more grooves formed in the tapered outer surface; and

solid lubricant retained in one or more of the grooves;

wherein the pattern of grooves comprises a textured surface.

28. A self-lubricating expansion mandrel for expanding a tubular member, comprising:

a housing including a tapered outer surface;

one or more grooves formed in the tapered outer surface; and

solid lubricant retained in one or more of the grooves;

wherein the depth of the grooves is in a range of between about 1 and 4 microns.

29. A self-lubricating expansion mandrel for expanding a tubular member, comprising:

a housing including a tapered outer surface;

one or more grooves formed in the tapered outer surface; and

solid lubricant retained in one or more of the grooves;

wherein the depth of the grooves is in a range of between about 10 and 50 microns.

30. A self-lubricating expansion mandrel for expanding a tubular member, comprising:

a housing including a tapered outer surface;

one or more grooves formed in the tapered outer surface; and

solid lubricant retained in one or more of the grooves;

wherein the solid lubricant retained in one or more of the grooves comprises a thermo-sprayed coating.

31. A self-lubricating expansion mandrel for expanding a tubular member, comprising:

a housing including a tapered outer surface;

one or more grooves formed in the tapered outer surface; and

solid lubricant retained in one or more of the grooves;

wherein the depth of the grooves is in a range of between about 50 and 150 microns.

32. A self-lubricating expansion device for expanding a tubular member, comprising:

a housing including a tapered outer surface;

one or more depressions formed in the tapered outer surface; and

a lubricant supply chamber in the housing;

a conduit from the lubricant supply chamber to one or more of the depressions; and

means for forcing lubricant from the lubricant supply chamber through the conduit to one or more of the depressions.

33. The self-lubricating expansion mandrel of claim 32, wherein the one or more depressions comprise circumferential grooves.

34. The self-lubricating expansion mandrel of claim 32, wherein the depressions comprise axial grooves.

35. The self-lubricating expansion mandrel of claim 32, wherein the depressions comprise a pattern of grooves with both an axial and a circumferential component.



36. The self-lubricating expansion mandrel of claim 35, wherein the pattern of grooves comprises a textured surface.
37. A self-lubricating expansion device for expanding a tubular member, wherein the interface between the expansion device and the tubular member, during the expansion process, includes a leading edge portion and a trailing edge portion, comprising:  
a housing including a tapered outer surface;  
one or more first depressions formed in the leading edge portion of the tapered outer surface; and  
a lubricant supply chamber in the housing;  
a conduit from the lubricant supply chamber to one or more of the first depressions;  
means for forcing lubricant from the lubricant supply chamber through the conduit to one or more of the depressions;  
one or more second depressions formed in the trailing edge portion of the tapered outer surface; and  
a solid lubricant provided within one or more of the second depressions.
38. The self-lubricating expansion mandrel of claim 37, wherein one or more of the first and second depressions comprise circumferential grooves.
39. The self-lubricating expansion mandrel of claim 37, wherein one or more of the first and second depressions comprise axial grooves.
40. The self-lubricating expansion mandrel of claim 37, wherein one or more of the first and second depressions comprise a pattern of grooves with both an axial and a circumferential component.
41. The self-lubricating expansion mandrel of claim 40, wherein the pattern of grooves comprises a textured surface.
42. A method of lubricating the interface between an expansion device and a tubular member during an expansion of the tubular member using the expansion device, wherein the interface between the expansion device and the tubular member comprises a leading edge portion and a trailing edge portion, comprising:  
injecting a fluid lubricant into the leading edge portion; and  
providing a solid lubricant in the trailing edge portion.
43. A system for lubricating the interface between an expansion device and a tubular member during an expansion of the tubular member using the expansion device, wherein the interface between the expansion device and the tubular member comprises a leading edge portion and a trailing edge portion, comprising:  
means for injecting a fluid lubricant into the leading edge portion; and  
means for providing a solid lubricant in the trailing edge portion.
44. A method of lubricating the interface between an expansion device and a tubular member during an expansion of the tubular member using the expansion device, wherein the interface between the

expansion device and the tubular member comprises a leading edge portion and a trailing edge portion, comprising:

providing a supply of a fluid lubricant within the expansion device; and  
injecting the fluid lubricant into the leading edge portion.

45. A system for lubricating the interface between an expansion device and a tubular member during an expansion of the tubular member using the expansion device, wherein the interface between the expansion device and the tubular member comprises a leading edge portion and a trailing edge portion, comprising:

means for providing a supply of a fluid lubricant within the expansion device; and  
means for injecting the fluid lubricant into the leading edge portion.

46. A method of lubricating the interface between an expansion device and a tubular member during an expansion of the tubular member using the expansion device, wherein the interface between the expansion device and the tubular member comprises a leading edge portion and a trailing edge portion, comprising:

providing a supply of a solid lubricant on the expansion device within the trailing edge portion.

47. A system for lubricating the interface between an expansion device and a tubular member during an expansion of the tubular member using the expansion device, wherein the interface between the expansion device and the tubular member comprises a leading edge portion and a trailing edge portion, comprising:

means for providing a supply of a solid lubricant on the expansion device within the trailing edge portion.